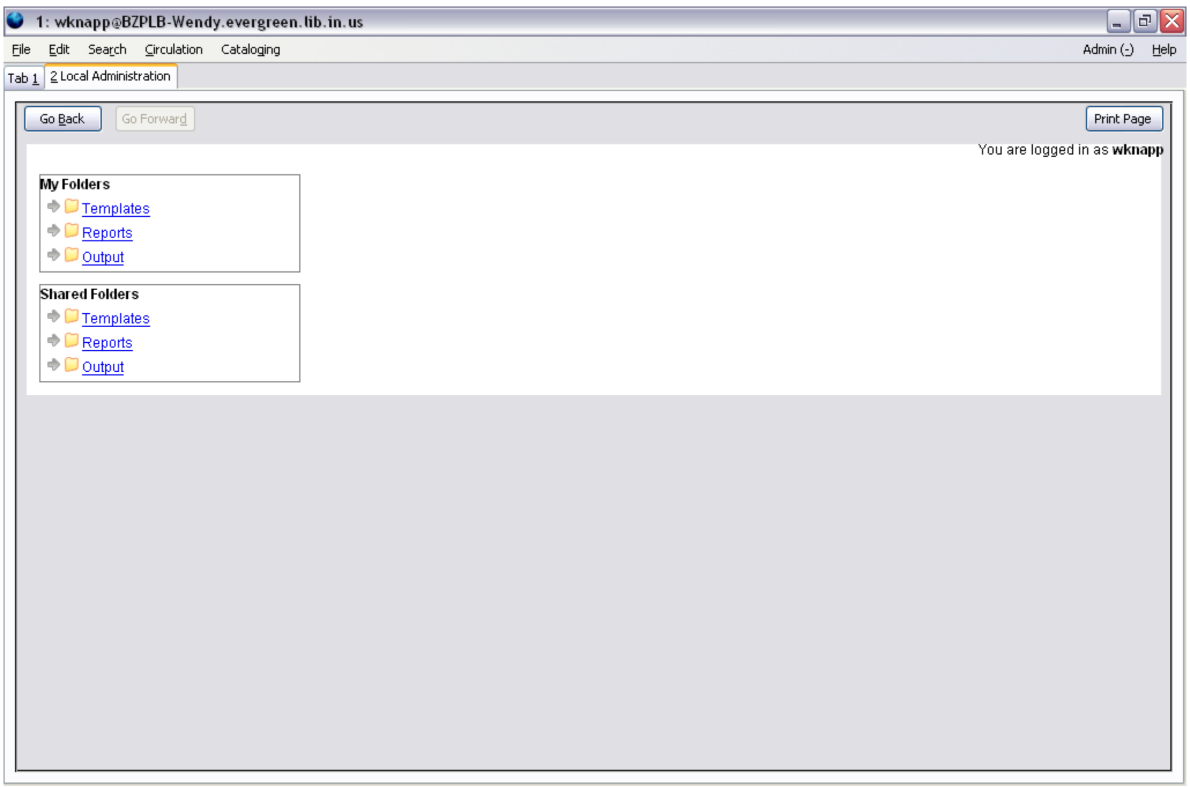
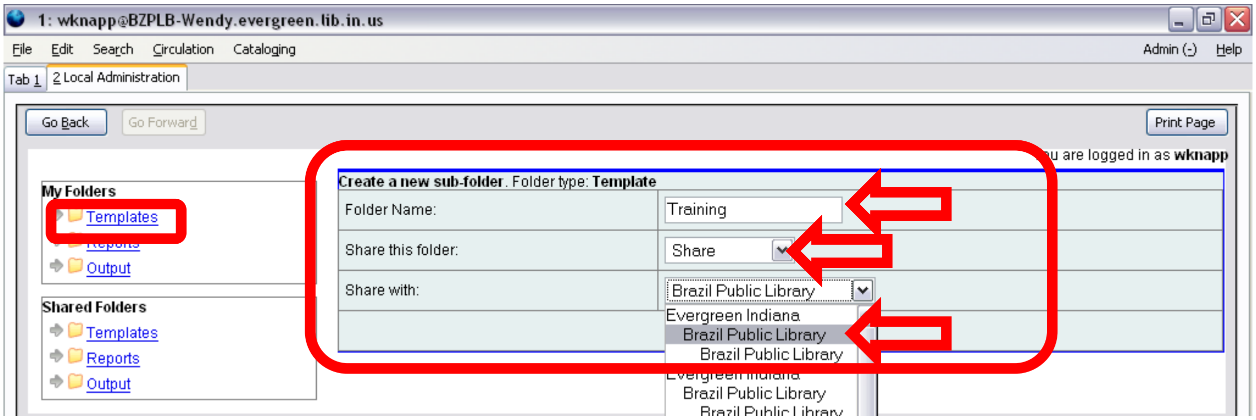
Reports from Scratch Training



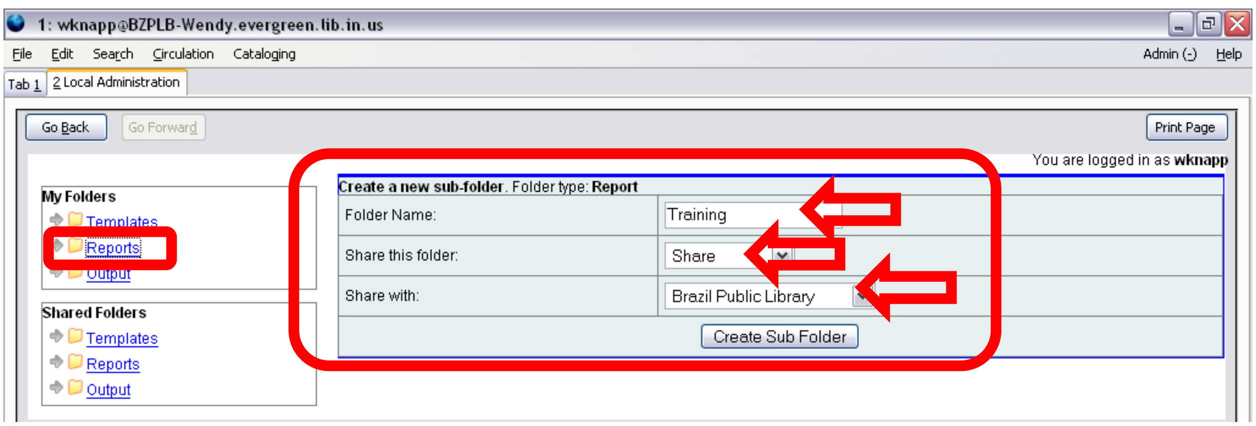
If there is not an exsisting template for the report you need, you can create a new template. This new template can be used to run one-time or recurring reports and can be emailed to other staff members, just as the exsisting templates can.

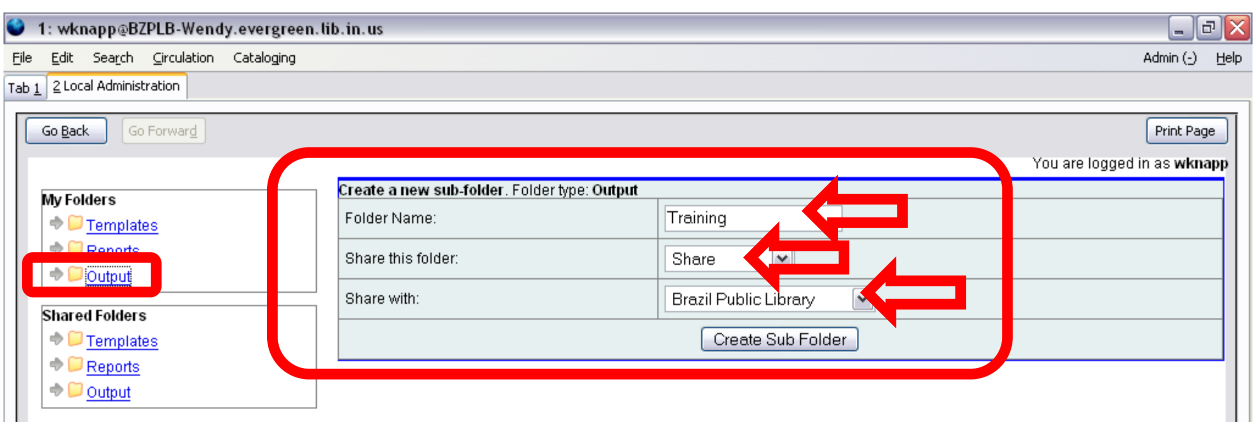


First we must create a new folder in the My Folders→Templates folder.

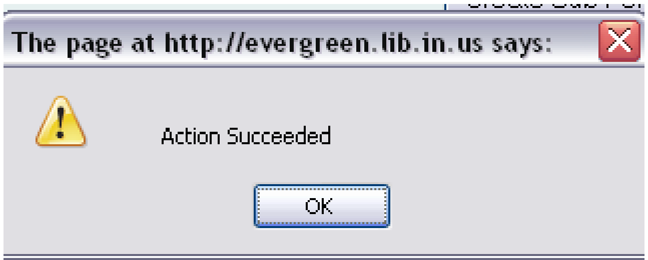
You'll want to share this folder with your library system. You'll see options to share with all of Evergreen Indiana or just your branch. Select your library system.

Once you've created your "Training" folder in My Folders→Templates, you'll create a "Training folder" in the My Folders→Reports folder and the My Folders→Output folder.

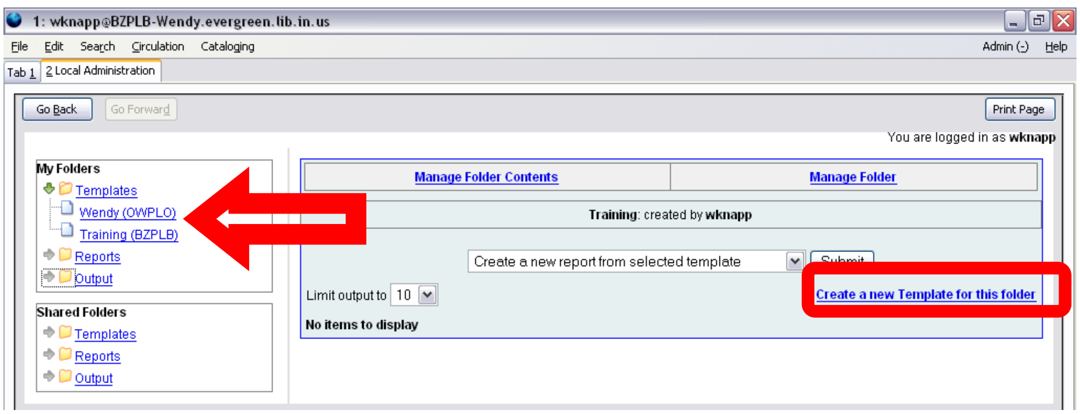




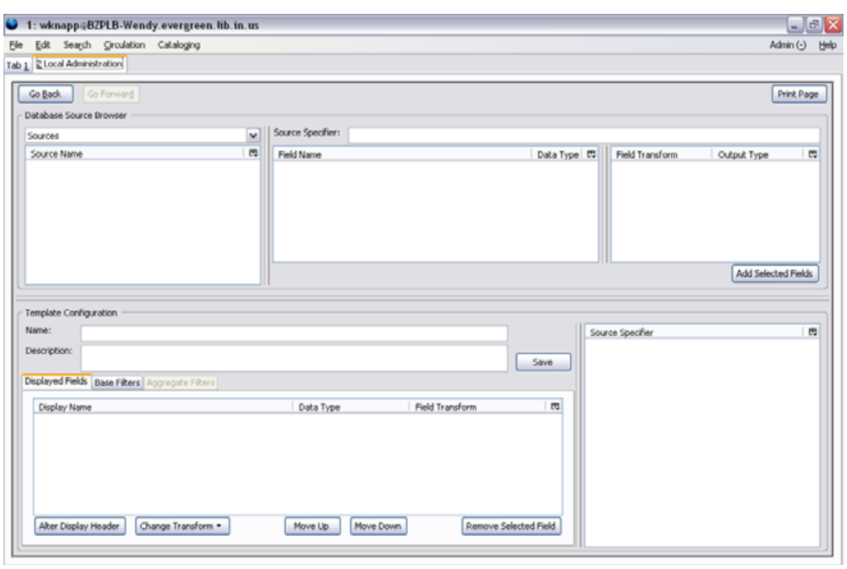
Once you click "Create Sub Folder" each time, you'll get the "Action Succeeded" Message.



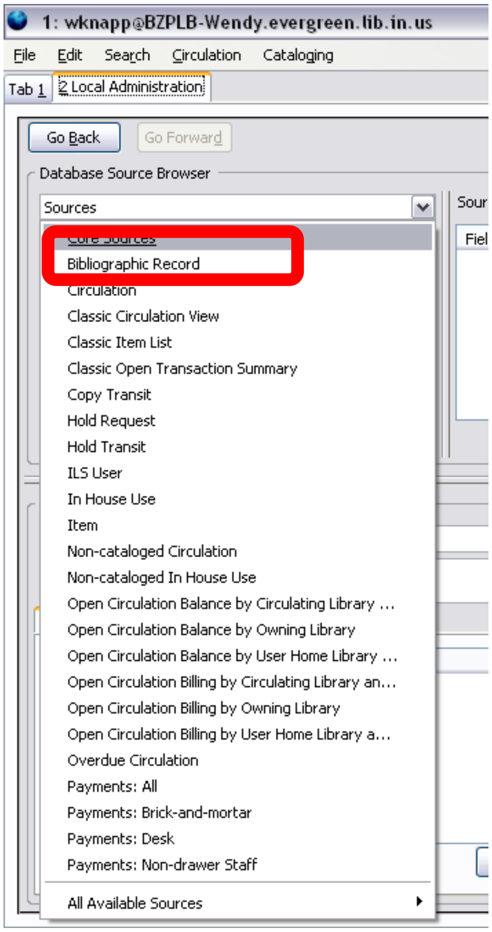
Now in the My Folders→Template Folder we just created, called "Training" we can create a new template from which we can run reports.



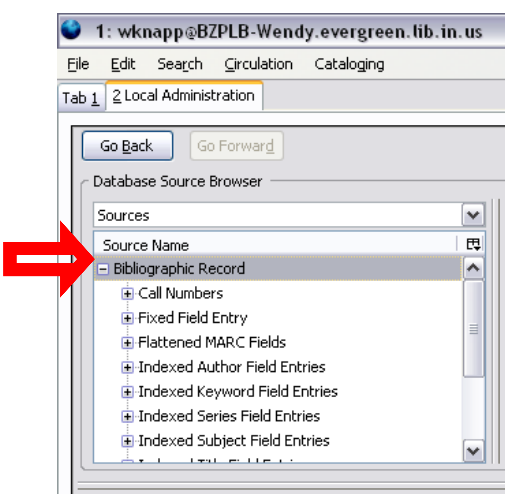
The Report Template builder demonstrate the flexibility of Evergreen with all the options and fields we'll populate.



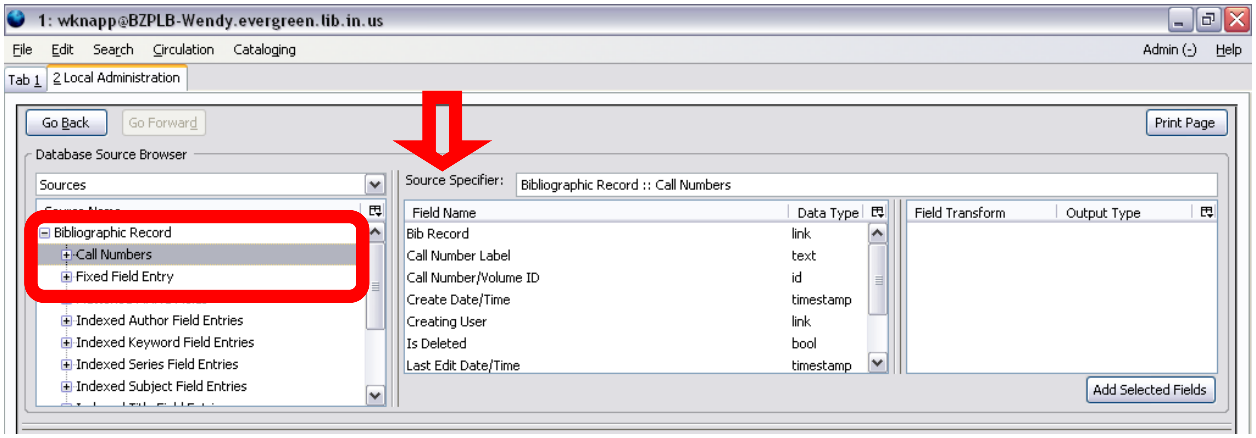
The first choice you have to make is the source table you'll use to pull the data from.



Think of the Source as the topic of your template. We'll be creating a report to find all the book by an author at a library. So we'll select the Bibliographic Record Source. Expand the Bibliographic Record Source Table to see all the tables that are linked to this table.

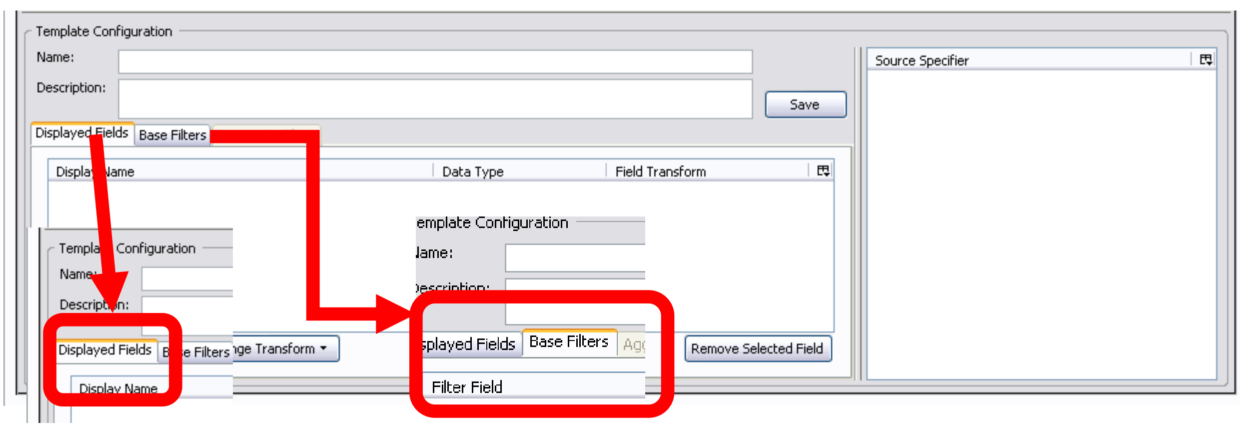


When a table is highlighted in the Source Name box, the fields in that table are displayed in the Source Specifier section.



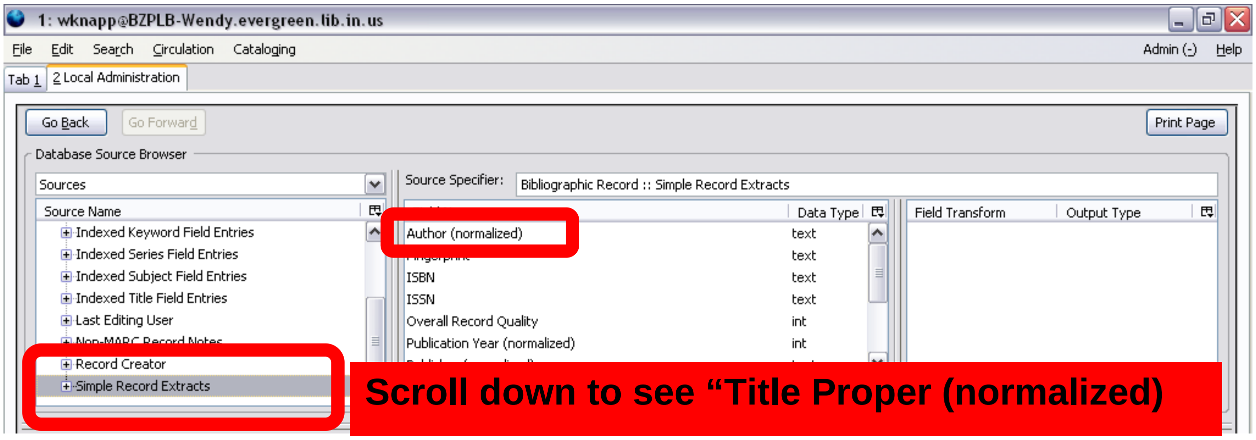
Each of fields we use will either be a "Displayed field" or a "Filter field." The "Displayed fields" are in the results of a report. The "Filter fields" are the fields you will use to make the choices that will determine the data retrived (i.e. a common filter field is Owning Library, so you can select your library as a filter field, and when the report is run, it will only return results that are owned by your library).

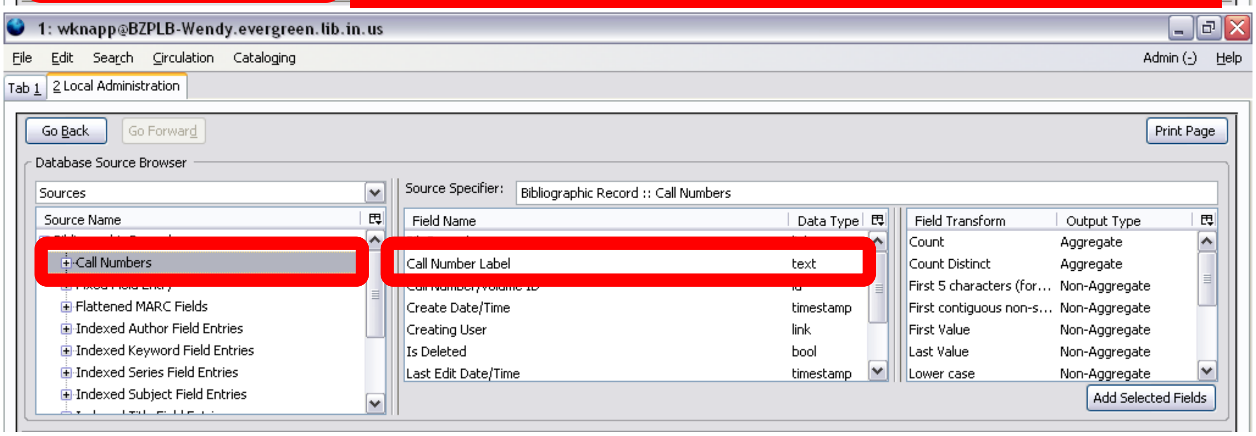
You'll add fields as either "Displayed fields" or "Filter fields" by selecting the appropriate tab in the "Templage Configuration" area.



We want to display the author's name, the title of book, and the call number to display in our report. We want to filter by owning library, so that only the records owned at our chosen library will be in the report. And we want to filter by the Author's Name, so we can run this report by entering any author's name in the Report, and get the output for that author.

Let's add our "Displayed fields" first. We'll find the Author and Title in the "Simple Records Extract" Table and the Call Number Label in the "Call Numbers" Table.





When you have selected each field you will click the "Add Selected Fields" button in the lower right corner of the Source Specifier area.

Do this for each field with the "Displayed Fields" tab highlighted in the Template Configuration area:

Table: Simple Record Extracts

Field Name: Author (normalized)

Click Add Selected Fields

Table: Simple Record Extracts

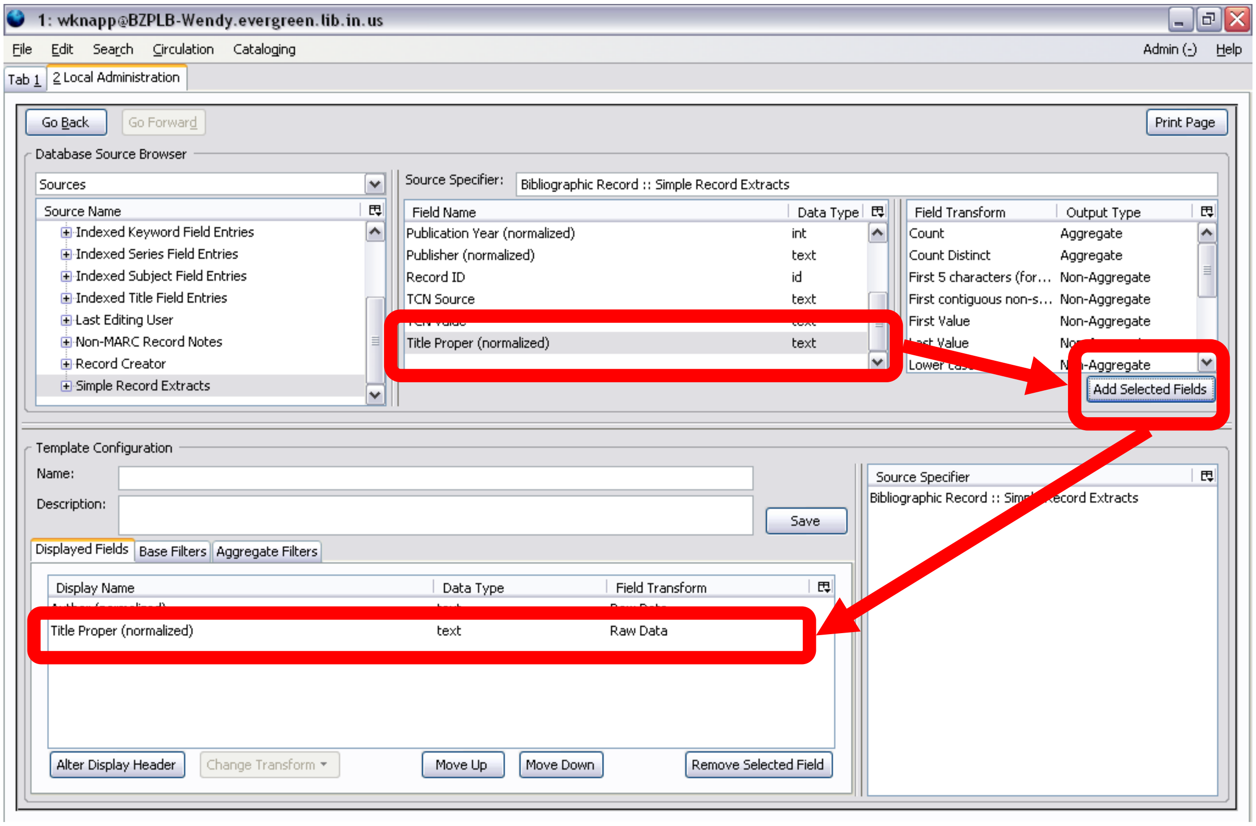
Field Name: Title proper (normalized)

Click Add Selected Fields

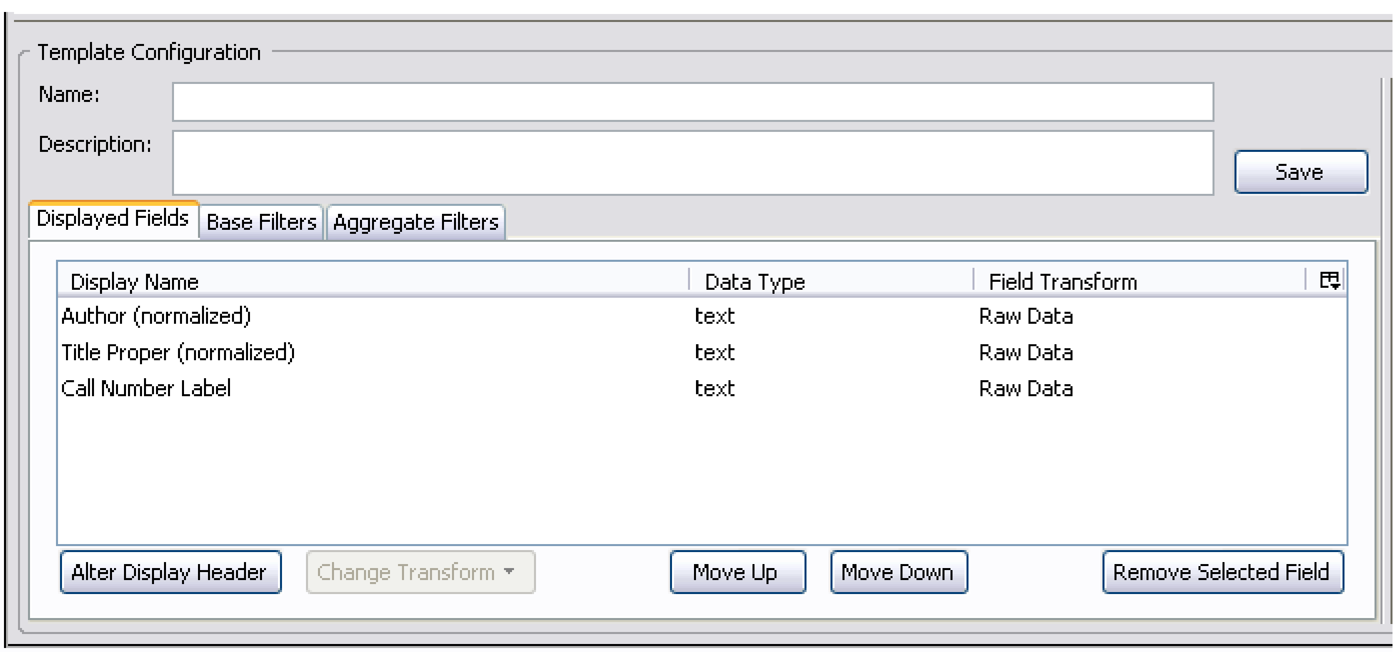
Table: Call Numbers

Field Name: Call Number Label

Click Add Selected Fields



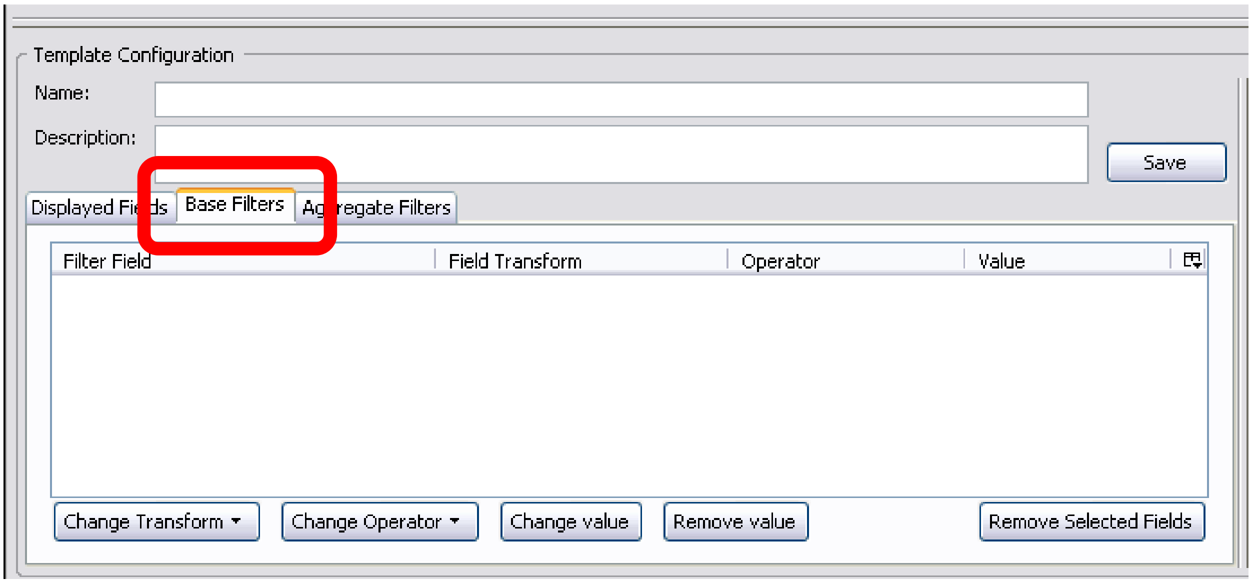
When all three fields are added your Template Configuration will look like this:



Note the Displayed Fields Tab is highlighted.

Next we'll add Base Filters so when we create the Reports from this template, we can select the Owning Library from a list of Evergreen Indiana Libraries, and we can enter an author's name in a text box.

Start by selecting the "Base Filters" tab in the Template Configuration area.



We'll find the Author's name field in the same table as above:

Table: Simple Record Extracts

Field Name: Author (normalized)

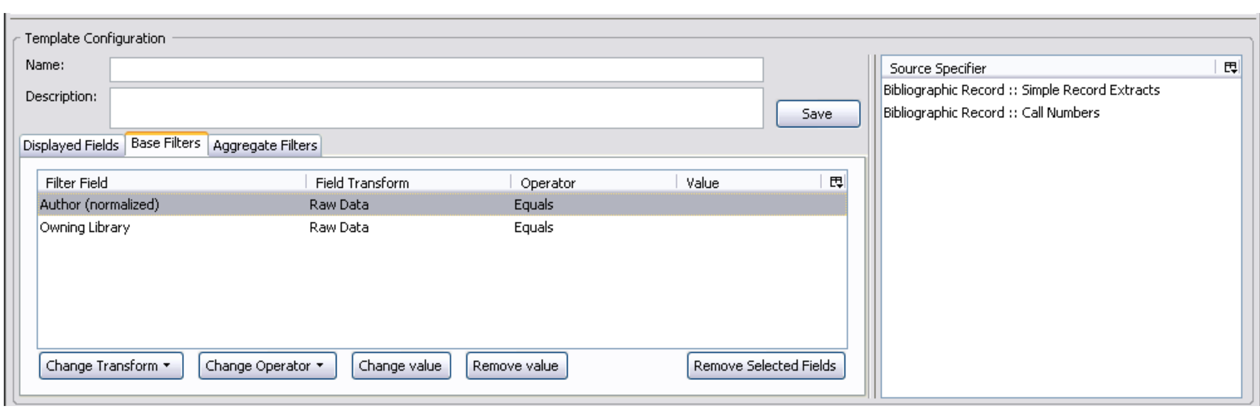
Click Add Selected Field

The Owning Library field is in the same table with the Call Number Label

Table: Call Numbers

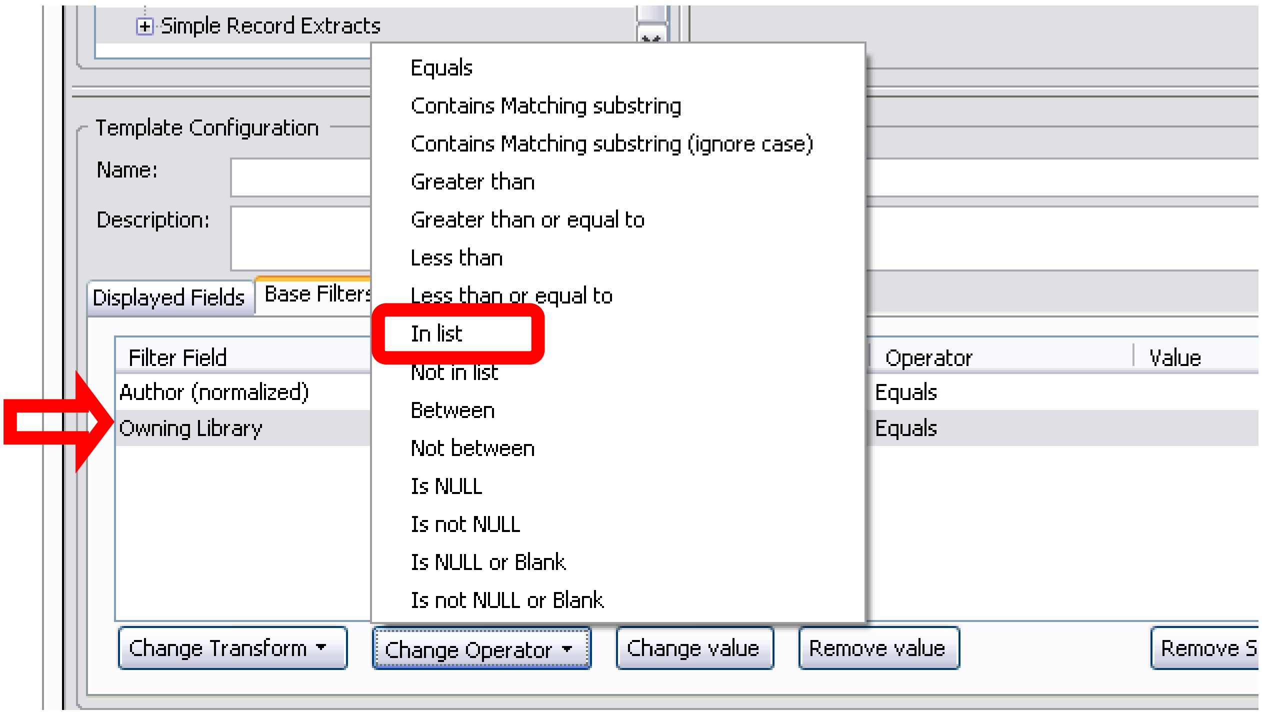
Field Name: Owning Library

Click Add Selected Field

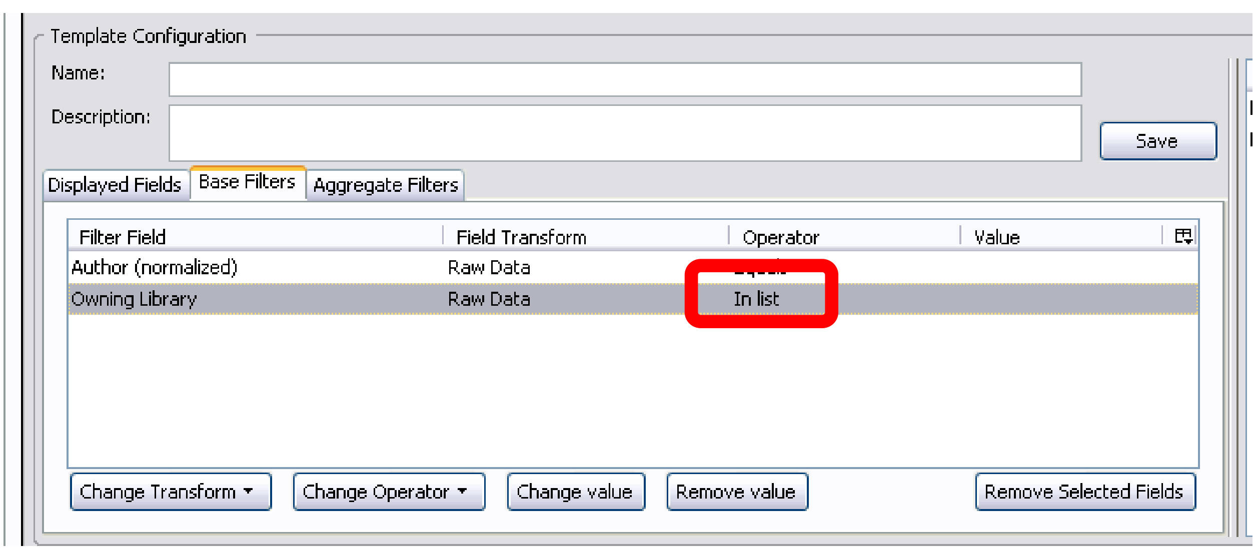


By leaving the Field Transform as "Raw Data" and the Operator as "Equals" for the Author Normalized field, we are able to type the author's name into a text box. (Be sure you are spelling the author's name correctly!)

Because we want to pick the Owning Library from a list of Evergreen Indiana Libraries (by the short name), we need to change the Operator to "In List." First, Highlight the Owning Library Field, then click "Change Operator" to get a menu of operators.



Select "In list"

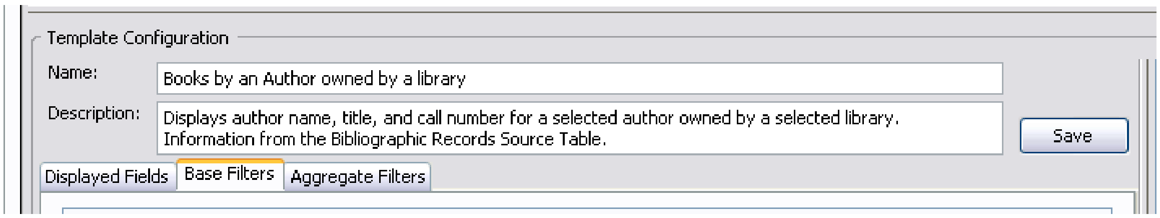


Now we can save the Template by naming it and giving it a descripton in the Template Configuration area.

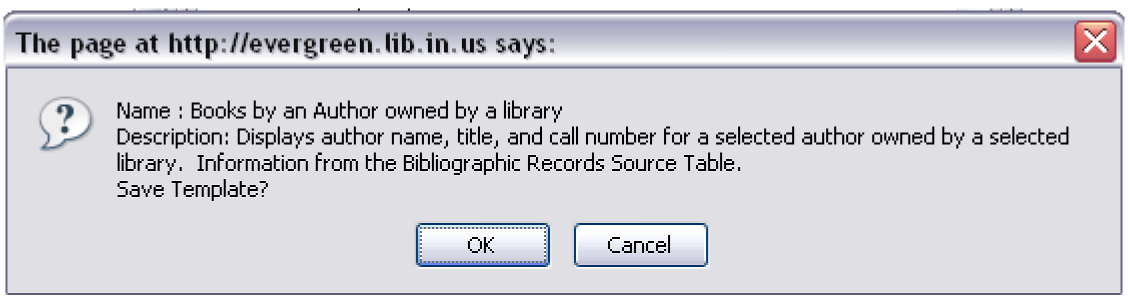
Let's call the report: Books by an Author owned by a library. We want to give a complete description that also gives information about this template. Let's make the description:

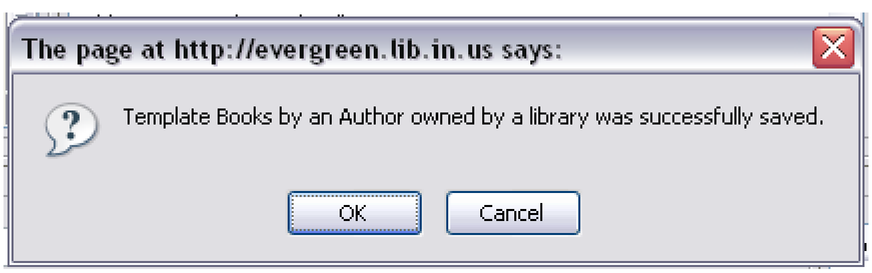
Displays author name, title, and call number for a selected author owned by a selected library. Information from the Bibliographic Records Source Table.

Then click "Save"

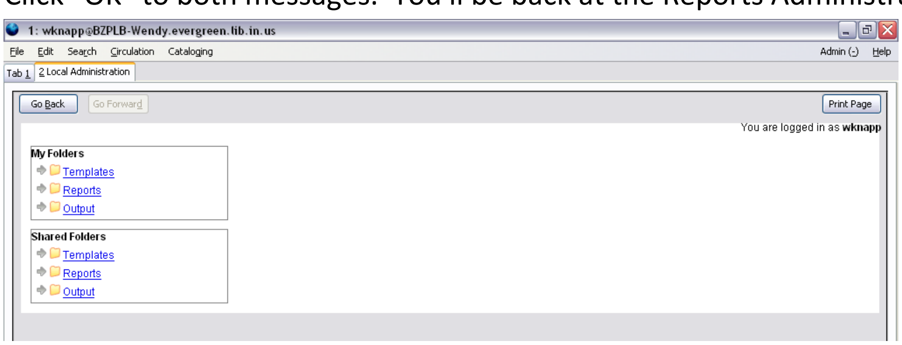


You will get two confirmations:



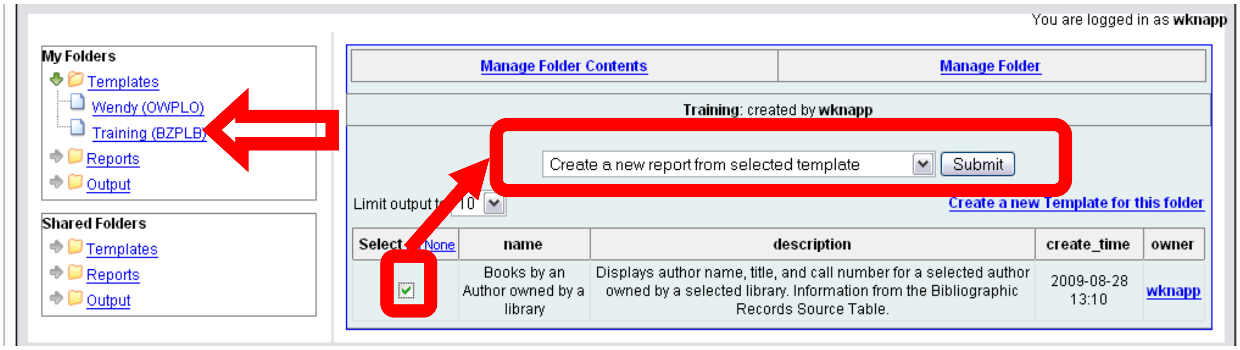


Click "OK" to both messages. You'll be back at the Reports Administraion Screen.



Now we will create a report from the Template we just created.

In My Folders, open the Templates Folder and navigate to the Training folder created at the beginning of this lesson. Select the Template "Book by an Author owned by a library" and select "Create a new report from selected template," then click "Submit"



This takes you to the screen you'll see when you're creating reports from pre-existing templates. As a reminder the following are required entries:

- Report Name
- Choose a folder to store this report definition
- User Defined Fields (in this case the author's name and the Library)
- Choose a folder to store this report's output

For this lesson, fill in following optional fields as:

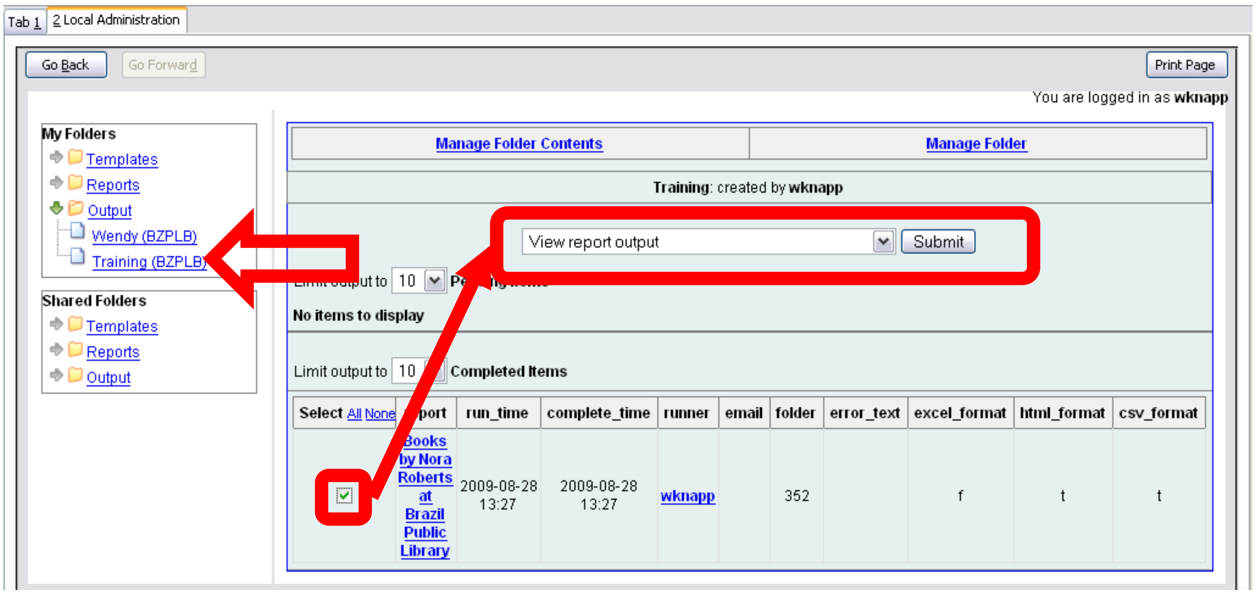
- Output Options: select CSV and HTML only
- Run the report ASAP

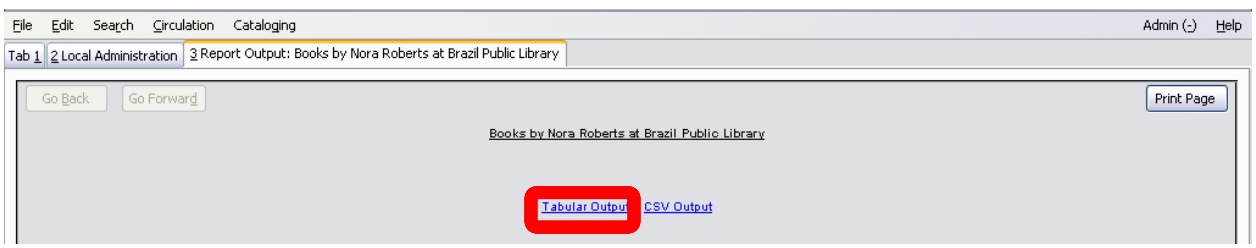
In the User Defined Fields, enter the author's name as it would appear in the catalog (i.e. last name, first name). Capitalization doesn't matter. Be sure to choose the library at the BRANCH level.

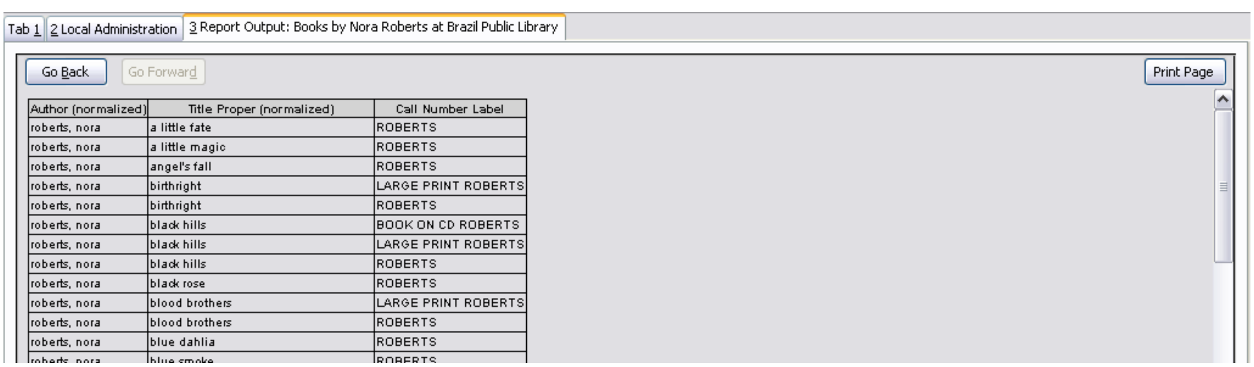
When you have filled in the above information click "Save Report" and you'll get a confirmation message.

Now you can see the results from My Folders→Output→Training

When the reports appears in the Completed Items, you can view the output in either HTML or CSV format.







Then you CRTL+W to close this tab.

Now let's add the ISBN numbers to our "Displayed fields." Editing is done by cloning the selected template and making changes to that new version, rather than overwriting the previous version.